

## Town of Royalston - Uniform Goal Setting & Performance Review Form

### PERFORMANCE REVIEW FORM 2007

#### PURPOSES OF PERFORMANCE REVIEWS:

The principal purposes of staff reviews are to encourage staff development and to strengthen the departments' effectiveness. Some specific purposes are to:

- A. identify specific indicators of achievement
- B. pin-point areas of greatest/least effectiveness
- C. stimulate improved performance
- D. aid in promotion, retention and salary decisions
- E. develop mutually established goals
- F. increase employer-employee communication

The formal performance review occurs at the end of the probationary period and formally, annually thereafter. It is very important to meet with each individual, at least quarterly, to identify incremental progress toward goals and to address issues, and positive acknowledgement whenever needed, rather than waiting to the end of the year either to acknowledge progress or to raise concerns. We all do better when we are affirmed and acknowledged along the way. The performance review form should be forwarded to the Town of Royalston Personnel Committee..

#### DEFINITIONS OF TERMS:

**CONSISTENTLY BELOW EXPECTATIONS:** Performance is at a level below established objectives with the result that overall contribution is marginal and substandard. Performance requires a high degree of supervision.

**BELOW EXPECTATIONS:** Meets some of the established objectives and expectations but definite areas exist where achievement is substandard. Performance requires somewhat more than normal degree of direction and supervision.

**MEETS EXPECTATIONS:** Meets established objectives in a satisfactory and adequate manner. Performance requires normal degree of supervision.

**EXCEEDS EXPECTATIONS:** Accomplishments are above expected level or essential requirements.

**CONSISTENTLY EXCEEDS EXPECTATIONS:** Job performance easily exceeds job requirements, performance approaches best possible attainment.

#### INSTRUCTIONS:

Listed on the following pages are a number of Performance Factors that are important in the successful completion of most assignments. **Factors 1-10 apply to all employees. Factors 11-15 apply only to administrators, department heads and supervisory personnel.** To complete the Performance Review Form, place an "X" under the level of achievement which most accurately describes the employee's performance on each factor. In the space provided by each of the Performance Factors, you are **encouraged** to support your ratings with clarifying comments and specific examples which occurred during the review period that determined or affected the level of achievement marked. Factors rated "Consistently Exceeds Expectations" or "Consistently Below Expectations" **must** be supported with examples or reasons. For further instructions refer to the Performance Review Manual.

**Provide an attachment for any designated space that is too small. Text that is too long for any given space will be noted with the number symbol. (Example: (#####))**

Employee's Name Last: First:		Social Security Number	
Position Title		Date of Review	
Department		Period Review From To	
<div>PERFORMANCE FACTORS</div> <p>Please enter the number corresponding of the Rating Key in the Box</p>		<b>Rating Key</b> 1. Consistently Below Expectations 2. Below Expectations 3. Meets Expectations 4. Exceeds Expectations 5. Consistently Exceeds Expectations 0. Unobservable or Not Applicable	

1. <b>QUALITY OF WORK:</b> How accurate, neat and complete is the individual's work Consider the degree work meets acceptable standards. <b>Examples or reasons for giving this rating are:</b>	1	2	3	4	5	0

2. <b>PRODUCTIVITY:</b> Does individual produce an acceptable amount of work Consider how person effectively uses available working time, plans and prioritizes work, sets and accomplishes goals and completes assignments on schedule. <b>Examples or reasons for giving this rating are:</b>	1	2	3	4	5	0

3. <b>KNOWLEDGE OF JOB:</b> Is individual familiar with duties and requirements of position as well as methods, practices, and equipment to do the job? Consider knowledge gained through experi- ence, education and specialized training. Consider if person maintains current knowledge about changes in policy and procedure: keeps abreast of new developments and major issues in field. <b>Examples or reasons for giving this rating are:</b>	1	2	3	4	5	0

4. <b>ADAPTABILITY:</b> How does individual adjust to changes? Consider ability to learn quickly, adapt to changes in job assignments, methods, personnel, or surroundings. <b>Examples or reasons for giving this rating are:</b>	1	2	3	4	5	0

5. <b>DEPENDABILITY:</b> How reliable is individual in performing work assignments and carry out instructions? Consider degree of supervision required and willingness to take on responsibilities and to be accountable for them. <b>Examples or reasons for giving this rating are:</b>	1	2	3	4	5	0

6. <b>INITIATIVE AND RESOURCEFULNESS:</b> Does individual see things to be done and then take action? Consider ability to contribute, develop and/or carry out new ideas or methods. Consider ability to be self-starter, to offer suggestions, to anticipate needs and to seek additional tasks as time permits. <b>Examples or reasons for giving this rating are:</b>	1	2	3	4	5	0

7. <b>JUDGMENT:</b> Does individual exercise ability to decide correct or choose best course of action when some decision must be made? Consider ability to evaluate facts and make sound decisions, and use of reasoning to identify, solve and prevent problems. Works in a safe manner, preventing accidents, injuries and theft. <b>Examples or reasons for giving this rating are:</b>	1	2	3	4	5	0

**8. RELATIONSHIPS WITH PEOPLE:** Does individual work effectively with others (supervisors, peers, subordinates)? Consider respect and courtesy shown to others, how attitude affects the work area, willingness to accept supervision, and attitude exhibited toward the University as well as own job. Are apparel, manners and sociability appropriate to the job responsibilities?

1	2	3	4	5	0

**Examples or reasons for giving this rating are:**

**9. ATTENDANCE AND PUNCTUALITY** How faithful is individual in reporting to work and staying on the job? Consider arrival times, observance of time limits for breaks and lunches. Consider patterns of sick leave, prior approval for vacation and prompt notice of absence due to illness.

1	2	3	4	5	0

**Examples or reasons for giving this rating are:**

**10. OTHER PERFORMANCE FACTORS:**

1	2	3	4	5	0

**Upon completing the above section for non-supervisory personnel, proceed to the page 4.**

## **Administrators, Department Heads and Supervisory Personnel**

**(Complete this section in addition to performance factors 1-10)**

**11. LEADERSHIP ABILITY:** Is administrator, department head or supervisor able to get employees, and co-workers to do willingly and well the duties to be accomplished? Consider ability to get the work done with a high degree of morale and satisfaction on the part of those doing the work; the ability to function consistently and effectively in an objective and rational manner regardless of pressures.

1	2	3	4	5	0

**Examples or reasons for giving this rating are:**

**12. APPRAISAL AND DEVELOPMENT OF PEOPLE:** Does administrator, department head or supervisor demonstrate ability to select, train and effectively develop subordinates by recognizing their abilities and improving their weaknesses? Consider ability to exhibit fairness and impartiality with employees in assigning job duties and objectively evaluate work performance.

1	2	3	4	5	0

**Examples or reasons for giving this rating are:**

**13. PLANNING AND ORGANIZATION:** How effective is the administrator, department head or supervisor in setting effective goals, planning ahead and establishing priorities? Consider ability to make the most effective use of time, facilities, material, equipment, employees skills and other resources. Examines ability to prepare and administer budget effectively.

1	2	3	4	5	0

**Examples or reasons for giving this rating are:**

**14. COMMUNICATION SKILLS:** To what extent does administrator, department head or supervisor demonstrate ability to communicate effectively in both oral and written expression with employees and his/her supervisor? Are issues confronted and resolved constructively? Consider ability to help employees with their work problems, ability to keep employees informed to decisions and plans for own office as well as policies and procedures of University.

1	2	3	4	5	0

**Examples or reasons for giving this rating are:**

**15. INTERNAL CONTROL:** Does administrator, department head or supervisor have an internal control program? If yes, how effective is the program? Consider how reliable the finance information is when received from the administrator, department head or supervisor. Does the individual safeguard assets? How effective and efficient is the operation? Does the administrator, department head or supervisor comply with the laws, regulations, policies and procedures?

1	2	3	4	5	0

**Examples or reasons for giving this rating are:**

**Upon completion of above sections, proceed to back page.**

**SUMMARY REVIEW SHEET****Department**

Review the ratings assigned to the Performance Factors on the previous pages. Check the category below which most clearly describes the employee's total performance.

TOTALS	1	2	3	4	5	0
From Pg 2 & 3						

Meets expectations #1-10 = 30

Meets expectations #1-15 = 45

Enter the totals from the box above

#1 CONSISTENTLY

#2 BELOW

#3 MEETS

#4 EXCEED

#5 CONSISTENTLY

☐ BELOW EXPECTATIONS   ☐ EXPECTATIONS   ☐ EXPECTATIONS   ☐ EXPECTATIONS   ☐ EXCEEDS EXPECTATIONS

**JOB SKILLS BEING PERFORMED WELL:****IMPROVEMENT PLANS:**

What can the employee do to improve his/her performance on the job?

1. What can the supervisor do to support the employee's performance improvement?

2. Do you have some suggestions about how your supervisor could be more effective?

**EMPLOYEE COMMENTS:**

If the employee wishes to do so, any comments concerning the Performance Improvement Plan or the evaluation (for example, agreement or disagreement) may be indicated in the space provided below.

I have reviewed this document and discussed the contents with my supervisor. **My signature means that I have been advised of my performance status and does not necessarily imply that I agree with this evaluation.**

\_\_\_\_\_  
Employee's Signature\_\_\_\_\_  
Date**SUPERVISOR'S COMMENTS:**

(Record here only those additional significant items brought up during the discussion with the employee which are not recorded elsewhere in this document.)

\_\_\_\_\_  
Supervisor's Signature\_\_\_\_\_  
Date\_\_\_\_\_  
Reviewer's Signature\_\_\_\_\_  
Date